



DIAMAN AWARDS 2020 Best Portfolio Manager Awards

DEFINITIONS:

- **GPF:** Managed Account that invest in Mutual Funds, Sicav or SIF investments
- **GPM:** Managed Account that invest directly in Single Stocks or single Bonds

Criteria for winners definition:

- 1) At least 12 months performance history as of the end of the calendar year (2018);
- 2) Provision of account detail (no client name and reference) demonstrating the asset at the starting of 2019 and asset to the end of 2019 without subscription or redemption in the period; (Upon organiser request)
- 3) Asset Classes awarded: Equity, Fixed Income, Flexible, Balanced;
- 4) The Portfolio Manager needs to report the last 12 monthly returns in the spreadsheet, due this year DIAMAN will apply the DIAMAN Ration indicator for the valuation of the winner.

Definition of "Single Asset Classes awarded":

1. **GPF or GPM Equity:** Managed Account with at least 75% of Equity investment direct or by Funds, the management account could use derivatives instruments as futures and options;
2. **GPF or GPM Fixed Income:** Managed Account with at least 80% in Bond or related Funds investing in bond strategies, with no more than 10% of Equity investment and no more than 20% in absolute returns Funds;
3. **GPF or GPM Flexible:** Managed Account without constrain in the asset allocation;
4. **GPF or GPM Balanced:** Managed Account with an equity investment range between 25% to 75%.

AWARDS CRITERIA

For each category of winners, DIAMAN's Research staff will analyse the monthly returns of the managed account presented by the Portfolio Managers using the DIAMAN Ratio Indicator. DIAMAN could also ask more information about the asset class used during the year and the asset class performance attribution to explain performance. All the Portfolio Managers that apply sending the spreadsheet with the returns will be invited to the Gala Dinner. The winner of each category will be awarded with the **DIAMAN Award Prize**. The awards will be assigned during the GALA Dinner on 20th February 2020, in Galzignano Terme, Hotel Radisson Blue, and all the Portfolio Managers can attend for free the QUANT Conference during the day and also the Full Investors event on 21st February 2020.

Please be aware that no salesperson will be accepted to present the GALA Dinner, with the only exclusion of the Sponsors of the QUANT event paying to reserve a table.

DIAMAN will award only the Portfolio Manager related to the Managed Account, no award will be assigned to Portfolio Manager not present during the DIAMAN Awards and he/she will lose the price.

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